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Item 3 of the provisional agenda**
Current situation with respect to regional and subregional cooperation

Statistics on drug trafficking trends in Europe and worldwide

Summary

The present report provides an overview of the latest trends in illicit drug production and trafficking in Europe, Central Asia and worldwide. The statistics and analysis in the report are based on the latest information available to the United Nations Office on Drugs and Crime. In respect of seizure statistics, the report focuses on the years up to and including 2013. The report also includes the latest information on cultivation, production and manufacture of illicit drugs.

Annual estimates of the area under opium poppy cultivation in Afghanistan increased for the fourth consecutive year in 2014 to record levels. In South-East Asia, opium poppy cultivation also increased and remained concentrated in Myanmar. Heroin seizures in South-Eastern Europe increased slightly, while seizures in Western and Central Europe remained stable at historically low levels. In Eastern Europe and South-Eastern Europe the availability of cocaine remained limited, while cocaine seizures in Western and Central Europe have declined since peaking in 2006 and remained relatively stable since 2008. After rapidly increasing up to 2012, global seizures of amphetamine-type stimulants stabilized in 2013. Over half of the worldwide seizures of "ecstasy"-type substances occurred in Europe, seizures of methamphetamine increased in parts of the region and amphetamine seizures remained stable in most European countries. Cannabis continues to be the most widely cultivated, produced, trafficked and consumed illicit drug worldwide. In 2013, cannabis herb seizures increased in Europe and most other regions worldwide.

* Available only in English, French, Russian and Spanish, which are the working languages of the subsidiary body.
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I. Introduction

1. The present report provides an overview of developments in the production and trafficking of the main illicit drugs at the global and regional levels with a particular focus on trends within Europe. Trafficking and seizure trends related to Central Asia and Transcaucasian countries[1] are also included in this report. Analysis is based on the latest information available to the United Nations Office on Drugs and Crime (UNODC).

2. Illicit cannabis, opium poppy and coca bush cultivation and illicit opium and coca production for the years up to and including 2014 are addressed in the report. With regard to drug trafficking, the report focuses on seizure statistics for the ten years to 2013, and provides an update on trafficking trends in cannabis, opiates, cocaine and amphetamine-type stimulants.

3. Information on illicit drug crop cultivation and production of plant-based drugs was drawn from the latest illicit crop-monitoring surveys published by UNODC. The primary source of information on drug trafficking is replies to the annual reports questionnaire (ARQ), part IV (illicit supply of drugs), submitted by Governments for 2013 and previous years.

4. The availability of drug seizure data for countries within Europe is very high which simplifies analysis and reduces the potential for variability from year-to-year due to missing data. At the time of writing, 2013 seizure data was available for nearly all European countries.

5. Part III of this report covers trends related to the trafficking and seizure of cannabis, opiates, cocaine and amphetamine-type stimulants. For each of these drug-types, the report contains a section on global trends and a section focused on Europe, its subregions, and the trafficking routes leading to Europe. Information related to drug seizure in Central Asia and Transcaucasian countries is also included in the regional trends section of this report.

II. Global trends in illicit drug crop cultivation and the production of plant-based drugs

A. Cannabis

6. Unlike other illicit crops such as coca bush and opium poppy, the cannabis plant lends itself to diverse cultivation methods and grows in a variety of environments. This makes assessing the extent of its cultivation and production difficult. Reports of cannabis cultivation and eradication show that a wide range of practices exist globally. Cannabis cultivation reports from Member States range from individuals growing a small number of plants for personal consumption through to large-scale commercial operations in warehouses, on farmland and within forests. Several countries reported the ongoing cultivation of cannabis by farmers in rural areas to supplement their incomes.

[1] Armenia, Azerbaijan and Georgia.

7. The cultivation of cannabis herb continues to occur in most countries worldwide, and in all regions of the world. In contrast, the large-scale production of cannabis resin remains confined to a few countries in North Africa and South-West Asia.

8. Morocco reported eradicating 5,000 hectares (ha) of cannabis in 2013 and estimated that, after eradication, 42,000 ha remained under cannabis cultivation. The authorities reported[2] that efforts to reduce the illicit cultivation of cannabis had continued and had resulted in a 65 per cent reduction in the surface area of cannabis farms in comparison with 2003. Morocco reported a stable trend with regard to the area under illicit cannabis cultivation in 2013, and a decrease in the production of cannabis resin, which amounted to 700 tons in 2013 (down from 760 tons in 2012).

9. Afghanistan remains one of the main producers of cannabis resin, with total cannabis cultivation estimated at 10,000 ha in 2012, yielding an estimated 1,400 tons of cannabis resin, 8 per cent higher than the previous year.[3] In 2013, cannabis cultivation in Afghanistan remained linked to opium poppy cultivation, with cannabis cultivation reported in 38 per cent of poppy-growing villages, compared with only 5 per cent of non-poppy-growing villages.[4]

10. In the 2013 ARQ, seventeen European countries reported the eradication of cannabis plants and, in total, more than 2 million cannabis plants where eradicated in the region. These plants were removed from both indoor (29 per cent of plants) and outdoor locations (71 per cent of plants). In addition, Armenia, Azerbaijan and Uzbekistan reported eradicating cannabis plants in 2013.

B. Opium poppy cultivation

11. Afghanistan and Myanmar continued to account for the majority of illicit opium poppy cultivation worldwide. Cultivation in Myanmar increased between 2006 and 2013, while cultivation in Afghanistan reached record levels in 2014.

12. According to the findings of the 2014 Afghanistan opium survey,[5] opium poppy cultivation amounted to 224,000 ha in 2014, a 7 per cent increase compared with 2013. Annual estimates of the area under opium poppy cultivation in Afghanistan have increased for four consecutive years. The majority (89 per cent) of opium poppy cultivation took place in nine provinces in the country's southern and western regions. Potential opium production in Afghanistan in 2014 was estimated at 6,400 tons, an increase of 17 per cent from the 2013 level (5,500 tons). The increase in production was the result of both increased cultivation and increased yield. Average opium yield amounted to 28.7 kg per ha in 2014, which was 9 per cent more than in 2013 (26.3 kg per ha).

13. The link between insecurity and opium poppy cultivation in Afghanistan continued to exist in 2014. According to the Department of Safety and Security of

[2] Country report submitted by Morocco to the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, held in Addis Ababa from 15 to 19 September 2014.

[3] UNODC and Ministry of Counter Narcotics of Afghanistan "Afghanistan: Survey of commercial cannabis cultivation and production 2012" (Vienna, September 2013).

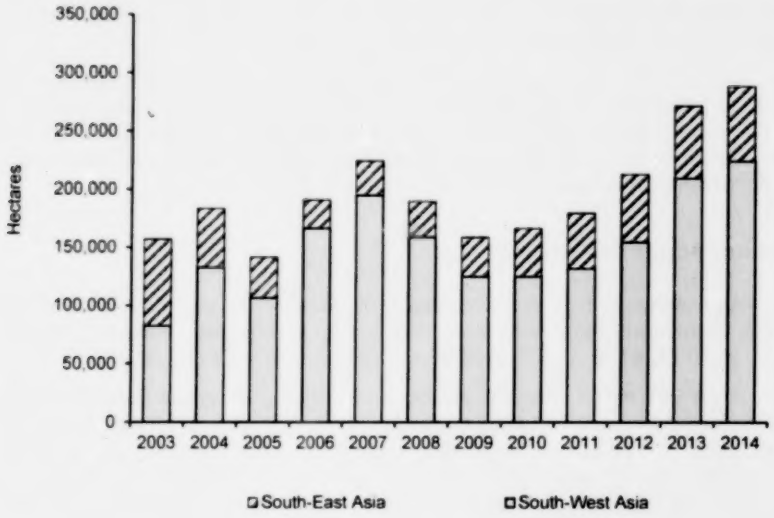
[4] *Afghanistan Opium Survey 2013* (Vienna, December 2013).

[5] *Afghanistan Opium Survey 2014* (Vienna, November 2014).

the Secretariat, the security risk in many of the provinces where opium poppy cultivation occurred is "high" or "extreme".

14. The South East Asia Opium Survey (2014)[6] found that although the majority of opium production in South-East Asia is confined to parts of Myanmar, particularly Shan State, a smaller, yet significant, amount is also produced in the Lao People's Democratic Republic. The survey reported no significant changes in opium production in Myanmar and the Lao People's Democratic Republic from 2013: the total combined area under opium cultivation in the two countries was estimated to be 63,800 hectares in 2014, compared to 61,700 hectares in 2013. The two countries produced an estimated combined total of 762 tons of opium in 2014.

Figure I
Opium cultivation in South-East and South-West Asia (2003-2014)
(Hectares)



15. Only partial information about the extent of opium poppy cultivation and heroin manufacture in the Americas is available, which makes analysis of the situation difficult. However, it is clear from the 2013 annual report questionnaire that heroin manufacture does occur within the Americas and that heroin is trafficked to the region from South-West Asia. Mexico reported the eradication of 14,662 ha of opium poppy in 2013, a decrease of 7 per cent compared with the level recorded in 2012 (15,786 ha). Colombia estimated the area under opium poppy cultivation in 2013 at 298 ha and reported the eradication of a further 514 ha. Colombia also reported dismantling one heroin laboratory a year in 2011, 2012 and 2013.

[6] *South East Asia Opium Survey 2014* (Vienna, December 2014).

C. Coca cultivation

16. Bolivia (Plurinational State of), Colombia and Peru continued to account for virtually all cultivation of coca bush worldwide. The total area under cultivation in those three countries decreased from 133,700 ha in 2012 to 120,800 ha in 2013. The illicit extraction of cocaine alkaloids from coca leaves, a first step in the manufacture of cocaine, took place almost exclusively in those three countries, which also accounted for the majority of cocaine hydrochloride manufactured worldwide.

17. According to the 2013 national coca monitoring survey in the Plurinational State of Bolivia, cultivation of coca bush fell by around 9 per cent. to 23,000 ha in 2013, the lowest level recorded since 2002. Satellite images and ground surveys showed reductions in the two main areas of cultivation, Yungas de La Paz and Trópico de Cochabamba, which accounted for 99 per cent of the area under coca bush cultivation. In those two areas, reductions of 7 and 12 per cent, respectively, were recorded.

18. The manual eradication of coca bush in the Plurinational State of Bolivia continued to increase in 2013, reaching 11,407 ha, while seizures of coca leaf dropped significantly in comparison with 2012. The number of cocaine hydrochloride laboratories destroyed by the authorities increased by 81 per cent, reaching 67 per cent in 2013.

19. The 2013 coca cultivation monitoring survey, jointly conducted by the Government of Colombia and UNODC, showed that coca bush cultivation in Colombia remained stable at historically low levels. Coca bush cultivation took place in 23 of the 32 departments in Colombia; while decreases in cultivation occurred in several regions, increases in other regions offset those decreases, leaving the total area under cultivation in the country stable at 48,000 ha. Despite the stable trend in 2013, the area under coca cultivation in Colombia has decreased significantly since 2000. In 2013, the estimated cocaine production capacity in Colombia ranged between 249 and 331 metric tons.

20. During 2013, the Colombian authorities destroyed a total of 2,128 laboratories where the extraction of coca paste or cocaine base was taking place, as well as 208 cocaine hydrochloride laboratories. Supply reduction activities in 2013 included the aerial spraying of over 47,000 ha of coca bush and the manual eradication of over 22,000 ha. Between 2003 and 2013, alternative development programmes benefited more than 156,000 families in 361 municipalities, promoting economic and social development in areas where coca bush cultivation was taking place and within communities linked to or at risk of being involved with that activity.

21. According to the 2013 national coca crop monitoring survey conducted by UNODC and the Peruvian Government, the area under coca cultivation in Peru at the end of 2013 stood at 49,800 ha, down from 60,400 ha in 2012. The authorities in Peru eradicated over 23,900 ha of coca crops in 2013, with most of the efforts focused on the Palcazú-Pichis-Pachitea area and the Monzón valley, which have the highest rates of expansion in the area used for cultivation and which serve as key points for the illicit production of drugs deriving from coca and coca products that are sourced both locally and elsewhere. Other areas where eradication took place included Alto Huallaga. Because of the eradication efforts and the subsequent

decrease in the supply of coca leaf, the average price for dried coca leaf in Peru increased by 30 per cent in 2013. The authorities reported that the State's eradication efforts in recent years had caused drug trafficking organizations to shift illicit cultivation to increasingly scattered and isolated areas.

Figure 2
Coca bush cultivation in Bolivia (Plurinational State of), Colombia and Peru (1983-2013)
(Hectares)

22. Although the manufacture of cocaine occurs mainly in Bolivia (Plurinational State of), Colombia and Peru, clandestine laboratories processing coca leaf derivatives also exist outside those countries. Based on data from the 2013 annual report questionnaire, several countries in South America, including Argentina, Chile, Ecuador and Venezuela (Bolivarian Republic of), reported the detection of clandestine laboratories in which the processing of coca leaf derivatives was taking place.

23. In 2013, two European countries[7] reported the detection of clandestine laboratories where the processing of coca leaf derivatives was taking place. Cocaine laboratories detected outside of South America are usually secondary extraction laboratories where cocaine is separated from the materials, such as clothing, used to traffic the drug.

[7] Greece and Spain.

III. Trends in illicit drug trafficking

24. Table 1 shows the reported quantities of seized drugs in Europe for the major drug groups in 2012 and 2013. Seizures of both cannabis herb and cannabis resin increased in 2013, cocaine seizures decreased back to 2008 to 2011 levels, seizures of opiates remained stable at historically low levels and ATS seizures remained at comparable levels to the previous year.

Table 1
European drug seizures 2012 and 2013

Drug Type		*2012 Seizures Europe (kilograms)*	*2013 Seizures Europe (kilograms)*
Cannabis			
	Cannabis herb	283,937	362,444
	Cannabis resin	488,006	560,359
Coca			
	Cocaine	71,942	59,724
Opiates			
	Opium	1,269	847
	Illicit morphine	12	60
	Heroin	20,822	21,294
ATS			
	Amphetamine	7,376	8,439
	Methamphetamine	1,039	872
	"Ecstasy"	2,303	2,139

25. In terms of seizures by weight, cannabis resin is the most seized drug in Europe (560 tons), followed by cannabis herb (362 tons), cocaine (54 tons) and heroin (21 tons). In 2013, there were increases in seizures of both cannabis herb and cannabis resin and a decrease in the amount of cocaine seized. While the amount of heroin and ATS seized remained similar to the previous year.

A. Cannabis

Cannabis herb — global trends

26. Data from the annual report questionnaire show that global cannabis herb seizures increased by 11 per cent in 2013, with increasing seizures of cannabis herb in several regions and decreases in North America.

27. Seizures of cannabis herb in North America have followed a decreasing trend in recent years, with seizures in the United States of America decreasing between 2009 and 2012. Seizures in Mexico have followed a similar trend, decreasing between 2010 and 2013. Despite the recent decreases, the United States and Mexico still account for the majority of global cannabis herb seizures.[8] Mexican authorities reported observing the production of cannabis herb for both local

[8] *World Drug Report 2014*.

consumption and for trafficking to the United States, most commonly overland, in private vehicles or passenger buses, using various methods of concealment.[9]

28. In South America, cannabis herb seizures increased sharply, from 719 tons in 2012 to 1,283 tons in 2013. The increase was the result of significant seizures by Paraguay[10] (462 tons), Colombia (408 tons) and Brazil (222 tons).

29. In most parts of Asia, seizures of cannabis herb generally remained stable in 2013 and amounted to 255 tons. The subregion of South Asia continued to account for the majority of seizures in Asia. Cannabis herb continues to be the most seized illicit drug in Oceania.

30. The relatively limited amount of data for African countries means that analysing trends related to cannabis herb at the regional and subregional levels is challenging. However, several Member States in the region have provided information on a consistent basis over several years. In 2013, three African countries (Egypt, Morocco and Nigeria) reported seizing over 200 tons of cannabis. At the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, participants observed that cannabis cultivation, production, trafficking and illicit use occurred in all parts of Africa, making it the primary illicit drug of concern for African authorities, as reflected in seizure statistics and the efforts of law enforcement.[11]

Cannabis herb — regional trends

31. Seizures of cannabis herb in Europe increased from 284 tons in 2012 to 362 tons in 2013. The increase was spread throughout Europe, with the greatest increase occurring in South-Eastern Europe where seizures increased by 42 per cent. Seizure by countries in West and Central Europe increased by 10 per cent, while seizures in Eastern Europe increased by 9 per cent.

32. In Turkey, seizures of cannabis herb have increased for nine consecutive years and amounted to 180 tons in 2013. The 180 tons seized by Turkey in 2013 is almost equivalent to the amount seized by all other countries in Europe (182 tons). The number of seizure cases involving cannabis herb reported by Turkey in the annual report questionnaire has increased steadily over the past decade, from 3,536 cases in 2003 to 60,742 cases in 2013.

33. In addition to the increase reported by Turkey, four other countries[12] in the region reported cannabis herb seizure in 2013 which were over 5 tons greater than those reported in 2012. According to Albanian State Police statistics,[13] cannabis seizures totalled almost 33 tons in 2013, well above the 21 tons seized in 2012. In Belgium, seizures amounted to 14.9 tons and in the 2013 annual reports questionnaire Belgium authorities reported the seizure of significant quantities

[9] Country report submitted by Mexico to the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held in Asunción from 6 to 10 October 2014.

[10] Country report submitted by Paraguay to the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Latin America and the Caribbean, held in Asunción from 6 to 10 October 2014.

[11] UNODC/HONLAF/24/5.

[12] Albania, Belgium, Italy and Spain.

[13] 2014 International Narcotics Control Strategy Report, United States Department of State.

(7.6 and 4.2 tons) of cannabis herb concealed within two maritime containers originating from West Africa. In addition, more than one ton of marijuana was discovered in a container originating from Central America. In Italy, seizures increased from 21.5 tons in 2012 to 28.9 tons in 2013. Spanish authorities reported no changes in trafficking trends in 2013 with seizures amounting to 16.3 tons (up from 10.5 tons in 2012, but down from 17.5 tons in 2011).

34. Between 2003 and 2013, seizures of cannabis herb in Central Asia increased at a slow but steady pace. Over this period, cannabis herb seizures have increased, on average, by four per cent each year from 24 tons in 2003 to 36 tons in 2013.

Cannabis resin — global trends

35. In contrast with cannabis herb, the production of cannabis resin is concentrated in a smaller number of countries, the most prominent of which are Afghanistan and Morocco. Consequently, seizure statistics for cannabis resin are also concentrated in and around those two source countries. The continuing shift in seizure trends suggests that cannabis resin production in Afghanistan is accounting for a growing share of the global market for cannabis resin.

36. Between 1990 and 2011, Morocco reported the largest annual cannabis resin seizures among countries in North Africa and, in 2012 and 2013, Morocco continued to seize significant quantities of cannabis resin (137 tons and 107 tons, respectively). Since 2012, however, Algeria has reported the largest annual cannabis resin seizures in North Africa, with seizures amounting to 157 tons in 2012 and 212 tons in 2013. Algeria attributed the significant increase in cannabis resin seizures to the real-time exchange of intelligence among law enforcement agencies, tightened security and surveillance measures along the western borders of the country, the expansion and modernization of drug law enforcement agencies and the training of personnel in techniques to combat drug trafficking.[14]

37. In 2013, seizures of cannabis resin in Egypt increased significantly, to 84 tons, up from 12 tons in 2012. Smuggling of cannabis resin into Egypt took place across land and maritime borders and through legal points of entry, particularly on the western border of the country. In addition to seizing cannabis resin originating in West Africa, authorities also seized cannabis resin originating in the Near and Middle East and South-West Asia.[15]

38. Two significant transit countries in the Near and Middle East and South-West Asia have reported that seizures of cannabis resin originating in Afghanistan are increasing; that trend continued in 2013. Pakistan reported seizing 313,736 kg of cannabis resin in 2013, which is almost double the amount seized in 2012. Authorities in Pakistan reported that Afghanistan was the source country for all of the cannabis resin seized during 2013. The Islamic Republic of Iran reported[16] seizing 76,067 kg of cannabis resin in 2013, which represents a 28 per cent increase when compared with seizures in 2012.

[14] Country report submitted by Algeria to the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, held in Addis Ababa from 15 to 19 September 2014.

[15] Country report submitted by Egypt to the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Africa, held in Addis Ababa from 15 to 19 September 2014.

[16] Islamic Republic of Iran, Drug Control Headquarters, Drug Control in 2013 (Tehran, March 2014).

Cannabis resin — regional trends

39. Over recent years, increases in the quantities of hashish seized in the regions of North Africa and the Near and Middle East have resulted in a smaller proportion of global cannabis resin seizures occurring in Europe. In 2013, 39 per cent of global cannabis resin seizures occurred in Europe, which is nearly half the level observed in 2001 when 77 per cent of all hashish seizures (by weight) occurred in the region.

40. Seizures of cannabis resin by Spain amounted to 319 tons in 2013, down from 326 tons in 2012. Cannabis resin seizures in Spain have decreased for five consecutive years. Spain reported that almost all of the cannabis resin entering the country originated in Morocco and that the main mode of transportation was by sea using speedboats, sailboats and fishing vessels. In addition to Spain, four other countries from Western and Central Europe[17] reported seizing over 5 tons of cannabis resin in 2013.

41. In South-Eastern Europe, Turkey reported a significant increase in seizures of cannabis resin, cannabis herb and synthetic cannabinoids. Seizures of cannabis resin in the country increased from 27 tons in 2012 to 94 tons in 2013. Authorities in Turkey reported[18] that cannabis resin originating in Afghanistan was trafficked to Turkey.

42. Seizures of hashish in Eastern Europe remained stable in 2013 at 2.2 tons. Since 2003, annual hashish seizures in the region have averaged 2.1 tons and ranged between 1.5 tons and 4.0 tons. Hashish seizures in Central Asia increased in 2013 to 3.8 tons and were concentrated in Kazakhstan where seizure amounted to 2.8 tons.

B. Opiates

Opium and illicit morphine — global trends

43. After increasing at a marked pace over the period 2003 to 2008 and peaking in 2009 at 653 tons, global opium seizures declined in 2010 and remained stable in 2011. In 2012 and 2013, global opium seizures increased but remained below the 2009 level.

44. Since 2002, three countries — Afghanistan, Iran (Islamic Republic of) and Pakistan — have consistently accounted for more than 90 per cent of global opium seizures each year; that trend continued in 2013. The Islamic Republic of Iran remained the country with the largest annual opium seizures with seizures increasing by 14 per cent in 2013, amounting to 436 tons. In Pakistan, opium seizures increased for the third consecutive year and reached 34 tons in 2013. The recent increase in opium seizures by Pakistan is consistent with reports[19] of the expansion of the "southern route", which is used to traffic heroin from South-West Asia. Opium seizures in Afghanistan increased between March 2011 and March 2013.[20] The amount of opium seized from suspects accused of narcotics-

[17] France, Italy, Portugal and the United Kingdom of Great Britain and Northern Ireland.

[18] Turkish Monitoring Centre for Drugs and Drug Addiction, 2013 National Report to the EMCDDA (Ankara, 2013).

[19] *World Drug Report 2014*.

[20] Ministry of Counter-Narcotics of Afghanistan and UNODC, *Afghanistan Drug Report 2012*, November 2013.

related crimes increased to 72 tons during the year from March 2012 to March 2013, up from 61 tons during the period 2011-2012 and 45 tons during the period 2010-2011.

45. India reported seizing 2.3 tons of opium in 2013, down from 3.6 tons in 2012. Indian authorities also reported seizing 4 tons of opium during the first eight months of 2014 and noted the suspected diversion of opium from licit cultivation and the local production of low-quality heroin.[21] In China, opium seizures amounted to 1.5 tons in 2013, up from 845 kg in 2012. China reported that 70 per cent of opium seizures had originated in Myanmar, 10 per cent in Lao People's Democratic Republic and 10 per cent in Afghanistan.

46. As was the case with opium, seizures of morphine continued to be concentrated in Afghanistan and its neighbouring countries. Every year from 2005 onwards, Afghanistan, Iran (Islamic Republic of) and Pakistan together accounted for more than 90 per cent of global morphine seizures. In the Islamic Republic of Iran, seizures of morphine increased by 49 per cent in 2013, to 10.4 tons. [22]

47. Illicit morphine seizures in Pakistan increased from 1.4 tons in 2012 to 3.8 tons in 2013. Pakistan reported that all of the illicit morphine seized had originated in Afghanistan and no changes had been observed in transportation methods or trafficking routes in 2013.

48. Seizures of illicit morphine in Afghanistan decreased to 24 tons in 2013, down from 44 tons in 2012. Despite the 2013 decrease, seizures of illicit morphine in Afghanistan remained significantly above the levels observed between 2003 and 2010, when annual seizures averaged 2.4 tons.

Opium and illicit morphine — regional trends

49. Less than half of one per cent of global opium seizures occur in Europe and, in any given year, many European countries report zero, or very small, opium seizures. In 2013, opium seizures in Europe amounted to less than 1 ton, with the largest seizures occurring in Germany (294 kg) and Turkey (210 kg). Turkey reported opium and its derivatives are shipped to Turkey from the Islamic Republic of Iran and observed that Iraq has been an important smuggling route in recent years.

50. Opium seizures in Central Asia and Transcaucasian countries have generally followed a declining trend since peaking in 2007. Seizures of opium in the subregion amounted to 2.2 tons in 2013 which, according to UNODC records, is the lowest level since 2002.

51. Seizures of illicit morphine in Europe amounted to just over 100 kilograms in 2013, with most Member States reporting no, or relatively small seizures relative to the quantity of heroin seized. No Members States from Central Asia reported illicit morphine seizures in the 2013 annual report questionnaire.

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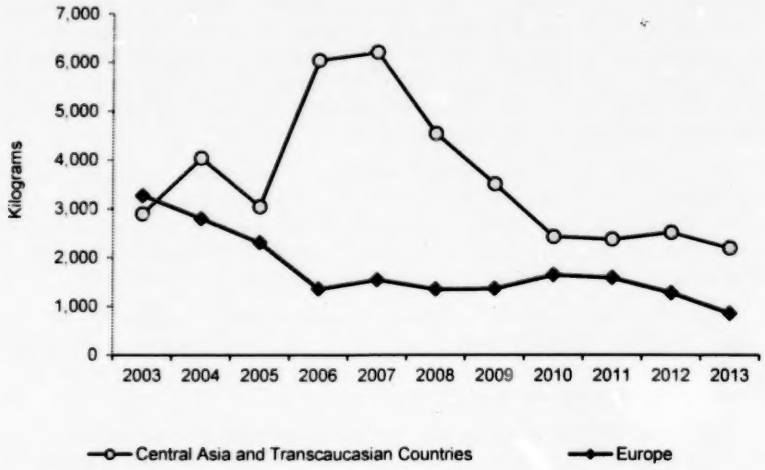
[21] Country report submitted by India to the Forty-ninth Session of the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East, held in Vienna from 10 to 13 November 2014.

[22] *Drug Control in 2013*.

Figure 3
Opium seizures — Europe, Central Asia and Transcaucasian countries (2003-2013)
(Kilograms)



Heroin — global trends

52. Compared with seizures of opium and illicit morphine, heroin seizures cover a much wider range of countries. Several countries reported increasing seizures along the "southern route", where heroin is trafficked southward from Afghanistan, through either Iran (Islamic Republic of) or Pakistan, destined for Asia and Europe, often via African counties or maritime routes. Significant seizures continue to occur along the "Balkan route", where heroin is trafficked to Western and Central Europe overland via South-Eastern Europe. The "northern route" continues to be used to transport heroin from Afghanistan to markets in the Russian Federation.[23]

53. Heroin seizures in Afghanistan amounted to 11 tons in 2011 and 7 tons in 2012 and 2013, significantly above the average of 3 tons seized during the period 2000-2010. In 2013, heroin seizures in Afghanistan accounted for approximately 10 per cent of global heroin seizures. As cultivation and production levels increase, countries bordering Afghanistan and countries along the increasingly diverse supply routes continue to account for the majority of global heroin seizures. In the Islamic Republic of Iran, the National Drug Control Headquarters reported a 53 per cent rise in heroin seizures in 2013, with seizures amounting to 13.7 tons. Heroin seizures in Pakistan remained near record levels in 2013 and amounted to over 11 tons. Authorities reported that the drug situation in

[23] UNODC, *The Illicit Drug Trade through South-Eastern Europe* (Vienna, March 2014).

Afghanistan had a direct bearing on Pakistan and estimated that 44 per cent of all Afghan heroin transited through Pakistan.[24]

54. ARQ data and country reports suggest that heroin traffickers are increasingly using African countries, particularly those in East Africa, to ship drugs to Europe and other regions. In July 2014, Kenyan authorities seized a ship containing 377 kg of heroin and 33,200 litres of liquid heroin. In the United Republic of Tanzania, authorities reported significant increases in heroin seizures between 2010 and 2012 and indicated that drug traffickers were using alternative trafficking methods, such as reducing the amount of heroin trafficked in each consignment and sending a larger number of small packages. In West Africa, Nigeria reported seizures amounting to 25 kg of heroin in 2013, destined for North America and Western and Central Europe.

55. In East and South-East Asia, seizures of heroin increased for the third consecutive year, amounting to 12.4 tons in 2013. Heroin seizures also increased in South Asia and the Americas.

Heroin — regional trends

56. In Western and Central Europe, seizures of heroin in most countries either remained stable or continued to gradually decline, in line with the established trend. The exception was Belgium, where seizures of heroin increased dramatically, from 112 kg in 2012 to 1,182 kg in 2013. The increase was a result of two large individual seizures (865 kg and 230 kg) of heroin concealed in containers and intercepted by authorities at the port of Antwerp.

57. In 2013, heroin seizures in South-Eastern Europe increased slightly in comparison with 2012, although they remained below the levels observed in the region between 2007 and 2009. In Turkey, heroin seizures amounted to 13.5 tons in 2013, slightly above the 13.3 tons reported in 2012. A recent government report[25] highlighted several new developments in the routes and methods used by heroin traffickers. Those developments included an increase in heroin arriving in Turkey from Iraq instead of the Islamic Republic of Iran, the increasing use of sea containers in heroin trafficking and the diversification by organized criminal groups traditionally involved primarily in heroin trafficking into trafficking in cannabis resin and methamphetamine, in addition to heroin.

58. In 2013, heroin seizures in Central Asia were significantly lower than those reported between 2000 and 2008; seizures in the region have followed a generally decreasing trend since 2009. Kazakhstan reported[26] that narcotic substances were usually hidden in secret compartments in road vehicles and trains, in items of clothing and in body cavities.

59. The Russian Federation is a consumer market deriving its heroin supply from opium production and heroin manufacture in Afghanistan. Heroin continued to be

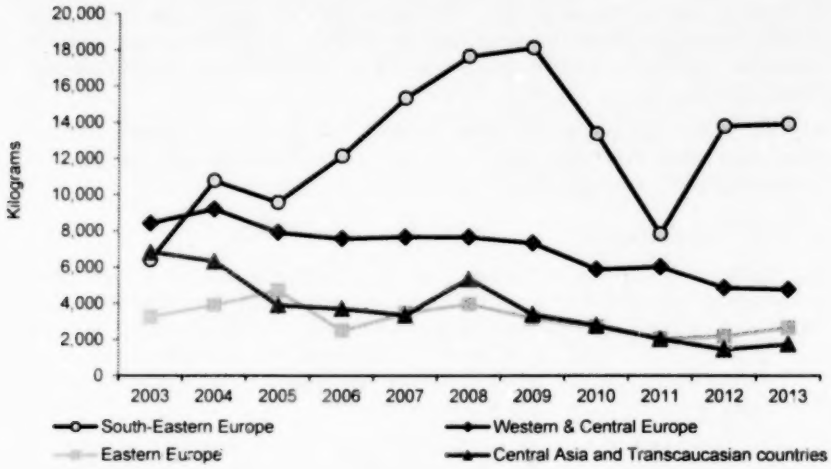
[24] Country report submitted by Pakistan to the Thirty-eighth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, held in Bangkok from 21 to 24 October 2014.

[25] *2013 National Report to the EMCDDA*.

[26] Country report submitted by Kazakhstan to the Forty-ninth Session of the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East, held in Vienna from 10 to 13 November 2014.

trafficked northward from Afghanistan to the Russian Federation via Central Asia. Between 2010 and 2013, heroin seizures by the Russian Federation where relatively stable, ranging from 2.0 to 2.6 tons per year.

Figure 4
Heroin seizures — Europe, Central Asia and Transcaucasian countries (2003-2013)
(Kilograms)



C. Cocaine

Cocaine — global trends

60. The main consumer markets for cocaine, namely North Am erica and Western and Central Europe, continued to be supplied by cocaine originating in South America, notably the Andean region. Cocaine from the Andean region is trafficked northwards to North America and across the Atlantic to Europe via the Caribbean or Africa. In 2013, Central America and the Caribbean continued to be reported as both transit and departure points for cocaine to Europe.

61. In 2013, South America continued to account for the majority of global cocaine seizures and cocaine seizures in the region remained at essentially the same level as the previous year. In North America, cocaine seizures decreased between 2007 and 2012 and data suggest a continued decrease in the availability of cocaine in the region. The United States accounts for most of the cocaine seizures in the region and the United States Drug Enforcement Agency estimates that cocaine availability has been declining since 2007.[27]

62. A secondary route for cocaine trafficked across the Atlantic to Europe involved the use of countries in Africa, notably West Africa, as transit countries.

[27] United States, Department of Justice, Drug Enforcement Agency, *National Drug Threat Assessment 2013* (November 2013).

Nigeria reported the seizure of 209 kg of cocaine in 2013, while Ghana reported a record 901 kg. Côte d'Ivoire also reported the seizure of 20 kg of cocaine in 2013, down from 27 kg in 2012.

Cocaine — regional trends

63. Based on seizure data, cocaine is the third most trafficked drug in Europe, after herbal cannabis and cannabis resin. In recent years, cocaine trafficking in Europe has evolved and became more complex with individual drug seizure cases reported to UNODC showing that maritime trafficking has increased as a means of transporting large quantities of cocaine.

64. Cocaine seizures in Western and Central Europe peaked at 121 tons in 2006 then declined to an average of 62 tons between 2008 and 2012. The stable trend continued in 2013 with seizures amounting to 60 tons. Annual cocaine seizures decreased by more than 300 kg in Belgium, Ireland, Italy and Portugal, while annual seizures increased by more than 300 kg in Greece and Spain. In other countries in Western and Central Europe that provided data on cocaine seizures in both 2012 and 2013, the amount of cocaine seized had remained similar to previous years.[28]

65. In most parts of Eastern and South-Eastern Europe the availability of cocaine remains limited when compared with other types of illicit drugs. In 2013, seizures in Eastern Europe amounted to 478 kilograms, while seizures in South-Eastern Europe amounted to 553 kilograms. Seizure data show that cocaine traffickers continue to target many parts of these subregions, with cocaine seizures reported by 4 countries in Eastern European and 9 countries in South-Eastern Europe in 2013.

D. Amphetamine-type stimulants (ATS)

ATS — global trends

66. Seizures since 2009 point to a rapid expansion of the global ATS market, with total ATS seizures amounting to over 140 tons in both 2011 and 2012. In 2013, global ATS seizures decreased but remained significantly above levels recorded prior to 2011.

67. In 2013, global seizures of amphetamine remained concentrated in the Near and Middle East and South-West Asia, where amphetamine is trafficked primarily in the form of Captagon tablets. Saudi Arabia continued to seize the largest quantities of amphetamine by a single country, with Saudi customs reporting the seizure of 39.7 million pills in 2013, up from 34.3 million pills in 2012. Jordan (22.5 million pills) and the Syrian Arab Republic (6.1 million pills) also reported significant Captagon seizures in 2013.

68. The regions of East and South-East Asia and North America account for the majority of global methamphetamine seizures, and the illicit manufacture of methamphetamine has traditionally been concentrated close to those consumer markets. However, it has recently also spread to other countries, where different methods of manufacture are used.

[28] Within 300 kg of 2012 levels.

69. The UNODC global Synthetics Monitoring: Analysis, Reporting and Trends (SMART) programme[29] observed that, in many regions of the world, a large proportion of seized pills marketed as "ecstasy" contain substances other than 3,4-methylenedioxymethamphetamine (MDMA), and the trend of selling new psychoactive substances as "ecstasy" has been observed in recent years.

ATS — regional trends

70. In 2013, most European countries reported seizing similar quantities of amphetamine to the previous year, with seizures in the region amounting to 8.3 tons (7.4 tons in 2012). Three Member States from the region — the United Kingdom of Great Britain and Northern Ireland, Germany and Turkey seized over 1 ton of amphetamine in 2013. The United Kingdom seized 1.5 tons of amphetamine in 2013 and reported that amphetamine-type substances and new psychoactive substances are mostly sourced from countries in Asia via the Internet and imported through the postal system, predominantly by dealers. Germany seized 1.3 tons of amphetamine in 2013, up from 1.1 tons in 2012. Turkey seized 4.5 million Captagon tablets in 2013 and reported cooperation with the authorities in Bulgaria and Saudi Arabia to counter Captagon trafficking.[30]

71. Europe's share of global methamphetamine seizures in 2013 remained stable at 1 per cent. However, despite still accounting for a relatively small proportion of global seizures, the quantity of methamphetamine seized in Europe has increased in line with increases in other regions. In 2013, methamphetamine seizures in Europe remained at historically elevated levels and amounted 870 kilograms, which is more than double the amount recorded annually in any year prior to 2008.

72. In Greece, crystalline methamphetamine seizures increased from 1 kg in 2012 to 15 kg in 2013. According to the Turkish National Police, crystalline methamphetamine makes up the majority of methamphetamine seizures in the country.[31] In 2013, methamphetamine seizures accounted for the largest share of ATS seizures reported in the Czech Republic, Slovakia, Belarus, Latvia, Lithuania and Moldova, as well as Cyprus, Greece and Portugal.

73. In 2013, over half (51 per cent) of global seizures of "ecstasy"-type substances occurred in Europe, with the majority of seizures concentrated in Western and Central and South-Eastern Europe. Seizure of "ecstasy"-type substances in South-Eastern Europe increased for the fourth consecutive year in 2013 to reach 1,226 kilograms. In Western and Central Europe, seizures have remained relatively stable since 2008 and ranged from 577 to 1,372 kilograms annually, which is well below the levels observed in between 2000 and 2007 when annual seizure averaged just less than 6 tons (5,992 kilograms).

74. In Central Asia and Transcaucasian countries, reported seizures of ATS amounted to less than 1 kilogram in 2013.

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[29] UNODC, "Global SMART Update", vol. 12, September 2014.

[30] Country report submitted by Turkey to the forty-ninth session of the Subcommission on Illicit Drug Traffic and Related Matters in the Near and Middle East, held in Vienna from 10 to 13 November 2014.

[31] Turkish National Police (KOM), Turkish Report of Anti-Smuggling and Organised Crime 2013, Ankara, June 2014.

IV. Conclusions

75. Annual estimates of the area under opium poppy cultivation in Afghanistan increased for the fourth consecutive year in 2014, reaching record levels. Potential opium production in Afghanistan also increased in 2014. In South-East Asia, opium poppy cultivation was concentrated in Myanmar. Globally, seizures of opium and illicit morphine remained concentrated in Afghanistan and neighbouring countries, while heroin seizures covered a wider geographic area. The 2013 data show an increase in the seizure of opiates trafficked from Afghanistan via the "southern route" and there has been an increased focus on that route by law enforcement agencies in several regions. Heroin seizures in South-Eastern Europe increased slightly, while seizures in Western and Central Europe remained stable at historically low levels.

76. Three Andean countries continue to account for virtually all cultivation of coca bush worldwide and the total area under coca bush cultivation decreased further in 2013. In Eastern Europe and South-Eastern Europe the availability of cocaine remained limited. Cocaine seizures in Western and Central Europe peaked at 121 tons in 2006, but have since declined to an average of 62 tons between 2008 and 2012 and remained stable at 60 tons in 2013.

77. After rapidly increasing up to 2012, global seizures of amphetamine-type stimulants stabilized in 2013. The regions of North America and East and South-East Asia continued to account for the majority of global methamphetamine seizures, and seizures in East and South-East Asia remained at record levels. In 2013, over half of the global seizures of "ecstasy"-type substances occurred in Europe, with the majority of seizures concentrated in Western and Central Europe and South-Eastern Europe. Seizures of methamphetamine increased in parts of the region and amphetamine seizures remained stable in most European countries.

78. Cannabis continues to be the most widely cultivated, produced, trafficked and consumed illicit drug worldwide. Global cannabis herb seizures increased in 2013 and seizures in Europe also increased to 362 tons. In recent years, a smaller proportion of global cannabis resin seizures have occurred in Europe.